User Experience Group (UXG) Procedures

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Contents

1. Remit and membership

The UXG will have no more than ten members, ideally fewer.
Member characteristics:
- Central Executive staff
- Broad experience
- Ability to make decisions on behalf of department

Decisions on membership of the User Experience Group are made jointly by the Head of Informatics and Knowledge Management and the User Experience Lead.

Members of the group will contribute to ensuring we make the best possible decisions by:
- bringing context-specific knowledge,
- considering the needs of a variety of users,
- flagging whenever there is a need to consult with particular constituencies,
- recognising relative priorities,
- working actively to reduce ambiguity, and
- focussing the group's work into discrete actionable items.

All members are expected to attend the majority of meetings, or to ensure they are able to vote on cases where possible if absent, particularly where a member's expertise is crucial to the decision-making surrounding a user story. Members are responsible for recording their contributions directly in the ideas.cochrane.org site, or in the UXG Project Management system (Wrike). Members may be appointed lead on specific projects within the UXG remit.

The User Experience (UX) Lead is responsible for management of the group, to include preparing for the meetings, managing user stories in between meetings, preparing for UXG meetings and chairing all UXG meetings. When needed, a temporary replacement can be be chosen from the IKMD staff or UXG members. The UXG Lead is supported by the IKMD Project Support Officer and the UX Analyst.

Product scope

The Ideas.cochrane.org site is the only way to submit user stories for UXG consideration. Currently (September 2014) the UXG receives ideas for the following tools/areas:
- Archie
- CRS
- Review editing (RevMan)
- Websites (.org , EWB, Training, Methods, etc). We are responsible the functionality of the content management system used for cochrane.org and other sites hosted by IKMD, but not website content in general

The scope is likely to be widened to include: methods, style guide, and other tools, such as the Cochrane Author Support Tool. In addition, the scope could potentially include end-user content in the Cochrane family of products, such as Cochrane Clinical Answers or *The Cochrane Library.*

2. Principles

- No minutes! Only Decisions and Actions:
    - We must document our decisions and actions.
    - This will be done as we speak - in ideas.cochrane.org, or our project management system (Wrike).
    - All UXG members to contribute by adding the key points directly to ideas.cochrane.org or the project management system (Wrike).
- Maximum transparency:
    - Email is for notifications not for decisions within the group
    - The process is designed such that it makes it easy for UXG to audit the UX Lead decisions, and for others to audit UXG decisions
- Efficient discussions:
    - If the UXG is lacking information needed to make a decision, the UX Lead will stop the discussion and assign an action and person to identify further information to support decision-making at a future meeting
    - Efficient discussions will be enabled by updating the UXG members in advance (1 day minimum) of the meeting to read through cases for decisions

3. Procedures

User stories: Our users are strongly encouraged to including at least one basic user story as part of their idea. Responsibility for crafting the final story(ies) lies with UX Lead/UXG. This means that a user story could be altered significantly from the original case submitted, if discussions recognise a more valuable user story.

a. Workflow of UXG process

1. An idea is submitted on ideas.cochrane.org
    - public and open for voting from this point forward
    - UX Lead receives notification
2. TRIAGE 1: UX Lead reviews, scores, and classifies as:
    - Unclear,
    - Open for voting,
    - UX Group Review (->2)
    - Consultation (->4)
    - Planned (->5)
3. TRIAGE 2: UXG scores and/or classifies items in the UX Group Review stage:
    - Unclear

- ○ Open for voting
- ○ Consultation (->4)
- ○ Planned (->5)
- ○ Declined
4. If, needed Consultation with relevant groups
   - ○ UXG the reviews in light of feedback
5. Implementation - the IKMD team chooses from the list of Planned ideas what to include in the next round of development, and then follows its process for releases, including testing. communications, and user feedback.

Most ideas will not go through all of the above stages. Many ideas will not receive immediate support, and may remain in the 'Open for voting' phase for quite a while. Ideas that are duplicates, remain very unclear, or are otherwise inappropriate will be removed by the UXL.
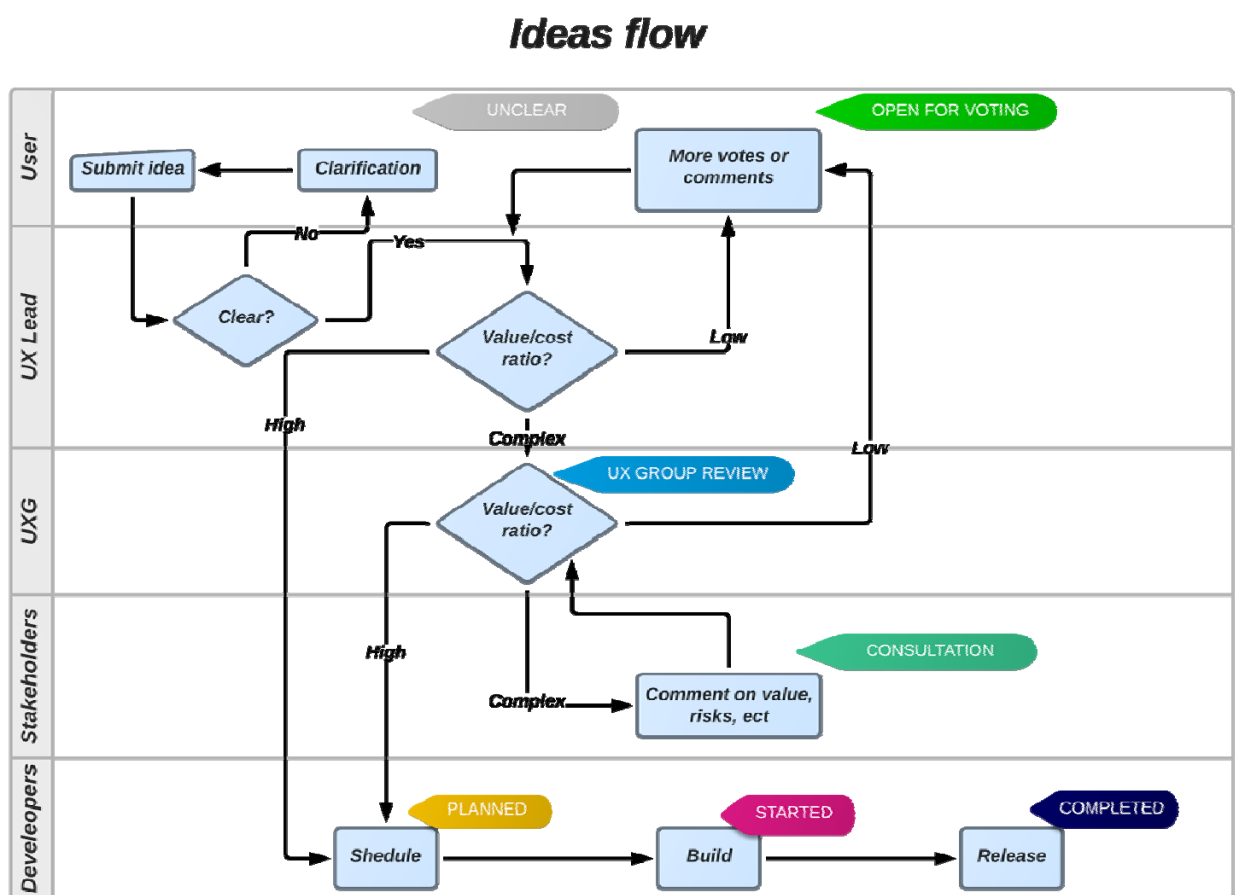

Fig 1: Process workflow for the User Experience Group

b. Idea statuses and the UXG workflow

Status	Detail, usage	Action required
(none)	New idea, not reviewed by anybody yet, can still be voted and commented do	**UXL** to review, grade, and assign other status

Unclear	More details requested. Assigned together with comment on what is requested.	**Submitter** (or others) to respond with clarification.
Open for voting	Awaiting more votes or comment before further action is taken.	No specific.
UX Group review	Being discussed by UXG.	UXG to decide, and assign other status.
Consultation	Awaiting feedback from one or more stakeholder groups	**Stakeholder Group(s)** to respond to feedback request
Planned	Agreed to develop - waiting to be added to a specific release.	**Product Owner** or **Project Manager** to schedule for development.
Started	In active development	**UXL** to flag as completed, once release
Completed	Released. All votes for this feature returned to users.	-
Declined	Will not be considered further (unless strong counter argument presented). All votes for this feature returned to users.	-
(deleted)	Offensive or incomprehensible.	-

c. Value scoring tool

UX Lead Tags/Flags/Scores Assessment of User Story

Consultation flags:
- ❏ Not Tech (as in primarily)
- ❏ Discuss by UXG
- ❏ Consult beyond UXG

Pros

　　+1, 2,or 3 High value
　　+1 Easy to do
　　+1 Supports new policy/critical methods update
　　+1 Obvious link to target
　　+1 Innovations potential

Cons

　　-1 Against current policy
　　-1 Low value
　　-1 Good alternative exists
　　-1 Hard to do
　　-1 Complex to scope
　　-1 Risk

d. Communications

Summary of decisions made:

- Weekly digest from UX Lead to UXG, public (web /w rss + email) - still to be implemented
- Bi-weekly digest from UXG to subscribers - Execs etc, public (web /w rss + email) - still to be implemented
- Tweets via @CochraneTech highlighting cases which people should be encouraged to vote for, or decisions that will be implemented including their release date (Project Support Officer to manage)
- Webinars set-up for significant releases of products, or compilation of smaller releases in one webinar
- 'Feature' stories on Informatics and Knowledge Management Department (IKMD) website, in newsletters (Within Cochrane and Cochrane Connect)

e. Consultation and liaisons (Stakeholders)

List of regular contacts for UXG consultation:
- Managing Editor Support, with consultation with ME Executive as required
- Trials Search Co-ordinator Executive
- Co-ordinating Editor Executive
- Fields Executive
- Centre Directors Executive
  - Centre staff
  - how/who best to consult with (there is the 3 Centre reps Miranda recommended)
- Consumers Executive
- Methods Executive
  - How to cover individual Methods groups
  - When to consult with MARS - should we be consulting with MARS in place of Methods Executive?
- Author forum
  - How to get individual author experts?
- Specific consultation eg Review Group satellites, DTAs, Wiley (Harriet & Jessica contact for now), Copy-edit support
- Specific contacts for individual components to be kept on this procedures document

Default process:

Within one week consulted body/person must return with one of following:
- Support the implementation
- Support, with conditions/changes: ….
- Oppose, on grounds: …
- More time needed, response to expected by:...

Try to stimulate good feedback by providing prototypes for comment

5. Appendix

a. Glossary:

UV (UserVoice): the ideas.cochrane.org site; the component where all public user story activity happens.
FB (Fogbugz): where we manage our production pipeline.

UX (User Experience): The totality of how systems and processes are perceived by users, with the drive to make it a positive user experience
UXG (User Experience Group): The group that prioritises Cochrane software User Stories
UXL (User Exprecne Lead)
User Story: A user story is about clearly telling us who you are, what you want and why you need it. Example: "As an author, I want to edit my review on my tablet so I can finish it faster."
Idea: The overall name for a submission on the user voice site (ideas.cochrane.org). An idea consists of a short distinctive title; should be based around a user story and can also include further descriptive text, attachments, and a series of comments.

b. Backlog processing

Principles guiding the transfer of old wishlist cases from the Fogbugz system.

Existing priority
- Critical + Important
   -> move into UV, tag with status 'Planned', Note about past priority
- Desirable
   -> move into UV, Note about past priority
- Low-priority
   -> move into UV, Note about past priority OR Don't move now, Archive in importable format
- Don't Implement
   -> move and tag as Rejected OR Don't move now, Archive in importable format

Not yet prioritized:
 -> move into UV, process by ? at rate of ?

ADAC / RAC - Priority	Votes
Submitted	1 vote
Low Priority	2 votes
"Desirable"	3 votes
"Important"	5 votes
"Critical"	10 votes

c. Intentions and ideas for the future of UXG
1. In the future we hope to use a system which automatically shares all decisions made that either go back in the pool, or straight to production with the UXG. All these decisions currently are transparent per case but, not as a batch brought for UXGs attention.
2. With the move to the new system, there is a resultant backlog which will need addressing and prioritising at some point.